

Nine tips for making a successful donor call

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I. Always have a Purpose for making a call

- A. Use the phone to screen donor prospects. Are they:
 - 1. Likely to make a gift
 - 2. Unlikely to make a gift
 - 3. Likely to make a gift at a future time
- B. Use personal “eye ball to eye ball” calls to:
 - 1. Get acquainted, establish and maintain rapport
 - 2. Provide updates about your organization
 - 3. Discuss donor benefits offered with gift arrangements
 - 4. Gather personal and pertinent donor information

II. Considerations for personal calls

- A. Donor’s turf: Comfort in their personal surroundings
- B. Make it a visit, not an interview
- C. Be sensitive to personality differences

III. Be observant. Look for and comment about:

- A. Photographs
- B. Furnishings
- C. Mementos
- D. Recognitions

IV. Fact-finding process (discovery):

Demonstrate sincere interest in prospect. Ask probing questions, and listen to the answers. *Four things people will talk about:*

- A. Family
- B. Occupation
- C. Recreation
- D. Money
 - a) Asset holdings
 - b) Return on current investments
 - c) Taxes
 - d) Management issues
 - e) Investment objectives

V. Focus on personal & family economic objectives

- A. Gifts to the heirs, if there are any
- B. Personal income needs and desires

- C. Reducing taxes on income, cap gains, and their estate
- D. Conservation of estate, leaving and giving more
- E. Current and testamentary gifts to charity

VI. Deliver institutional message with passion

- A. Reinforce its mission and purpose
- B. Match donor interests with programs that make a difference in the lives of individuals
- C. Discuss funding needs that will make programs possible
- D. Invite donor to see first hand how programs are working

VII. Discuss alternatives for making a gift

- A. Gift arrangements and method (How gift works)
- B. Approximate gift amount
- C. Target date to complete gift arrangement
- D. Type of assets considered

VIII. Ask for the gift

- A. If you don't ask, you won't get
- B. Emphasize how gift will make a difference
- C. Be patient and wait for answer
- D. Provide additional information when asked

IX. Follow up activity is your "key to success:"

- A. Define next step
- B. Schedule next contact
- C. Will it be by phone or a Meeting
- E. Mail information if necessary and expedient
- F. Keep track of moves that lead toward completing the gift

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